Quest v2.0

User Manual

SE 463
Assignment 5

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Preface

We sought to improve the Quest user experience by reducing the overall number of screens a user must navigate and adding several new features. First and perhaps most noticeable is the drop-down list for selecting terms. By default the current term is selected and the user can switch to a different term simply by selecting it from the list, without needing to navigate back several screens. In the Finances section we have added the ability to opt-out of optional fees by marking a checkbox, instead of requiring students to seek reimbursement. We also added several common methods of online payment. In the Academics section we have unified the add and drop courses screens into a single Course Management screen that helps students manage what they're taking. The course searching system has also been improved with a revised layout and the ability to use keywords. Finally, we have added the ability for students to export their fee lists, timetables, enrollment appointments and transcripts to a number of popular formats including PDF and XML.

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1 Introduction

1.1 Overview

Quest is the University of Waterloo's student information system. It serves as a portal for you, as a student, to

- Provide the University with your personal information
- Pay tuition and fees and examine your financial account status
- Enroll in classes and view your class schedule

The information within Quest is private and confidential, protected under the Freedom of Information and Protection of Privacy Act (FIPPA).

1.2 Terminology

TERM — A four-month period of academic study or co-operative work term experience. The University of Waterloo uses the following term schedule:

Fall:	September through December
Winter:	January through April
Spring:	May through August

AREA — A section of Quest that groups related functionality. Quest is divided into the following areas:

Academics:	tasks for managing courses and enrollment
Finances:	tasks for managing fee information and financial aid
Personal Information:	tasks for managing personal account information

SERVICE HOLD

An indicator specifying that you are not able to interact with portions of Quest. A service hold may be put on your Quest account by the Registrar due to unpaid fees or academic offenses. Holds may prevent you from enrolling in classes or viewing your grades.

DISTANCE EDUCATION (DE)

A Distance Education course is presented online or through other media such as audio disc. You do not have to be on the University of Waterloo campus to take a DE course.

1.3 Layout

The Quest layout is designed to make it easy to tell where you are inside Quest and navigate between areas. The numbered points refer to the labeled sections in Figure 1.1.

1. Sidebar: Contains the Term drop-down list and links to the Quest areas.

2. Navigation Trail: Displays a list of links for each page that corresponds to the links followed to get to that page. The list of links can be referred to as "Breadcrumbs".

3. Main area: This area changes and displays the current information for the page.

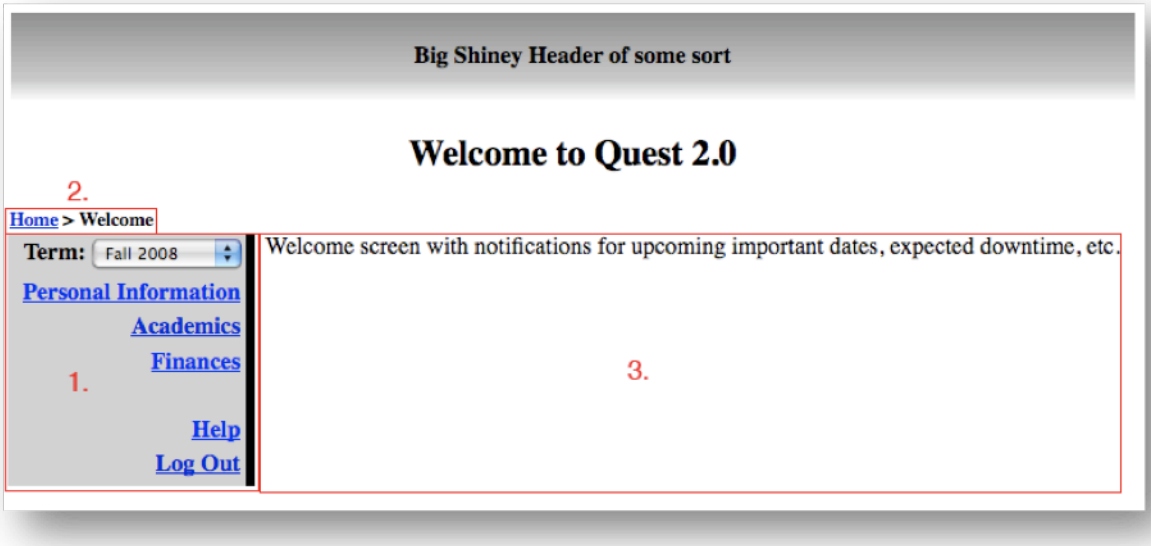


Figure 1.1 – Quest Layout

1.4 Outline

The remainder of this manual is dedicated to explaining how to use Quest. Section 2 describes logging on and other features important to the entirety of Quest. Sections 3 and 4 explore the basic and advanced features of Quest, respectively. Each section is divided into the Quest areas, Academics, Finances, and Student Information, where appropriate.

2 Getting Started

2.1 Logging In

Before you can use the features in Quest, you must first log in. In order to log in, you need to enter your user ID into the User ID text field, and your password into the Password text field in the centre of the Log In page and click the Log In button, as shown in Figure 2.1.

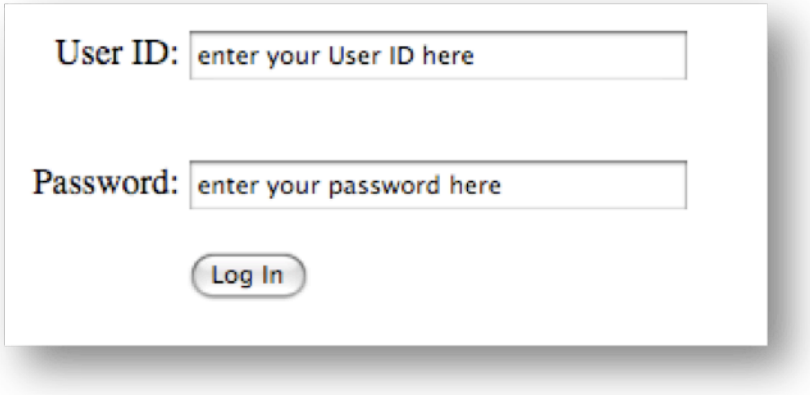


Figure 2.1 – Log In Page

Your user ID and password are assigned and emailed to you when you are first officially registered as a student. If you are unsure of your user ID or password, please contact Quest Support (quest_support@uwaterloo. ca).

2.2 Logging Out

Logging out from Quest is very important to ensure that others cannot gain access your account. Whenever you leave your computer, it is a good idea to log out of Quest in case another person uses the computer while you are away.

To log out, simply click the *Log Out* link found in the sidebar, as shown in Figure 2.2.

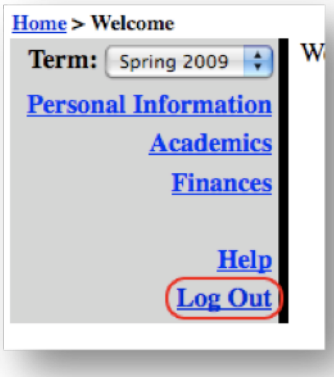


Figure 2.2 – Log Out Link

2.3 Help

The *Help* link on the sidebar is available to assist with your tasks when signed into Quest. Simply click on the *Help* link and a new window appears with context-sensitive help. In the new window, you can read about the features in the area that you are currently using. If this help information does not answer your question please contact Quest Support (quest_support@uwaterloo. ca).

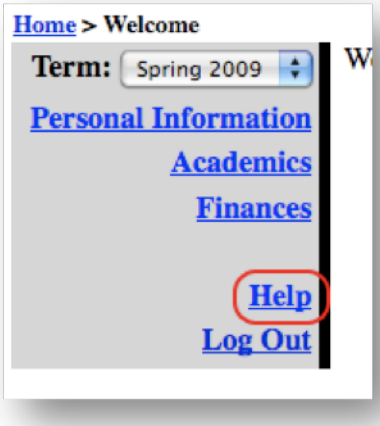


Figure 2.3 – Help Link

2.4 Time Out

In the event that Quest has been left inactive for 30 minutes you are logged out automatically. This automatic log out is referred to as a Session Time Out and helps ensure that no one can access your information if you inadvertently forget to logout of Quest as illustrated in Figure 2.4.

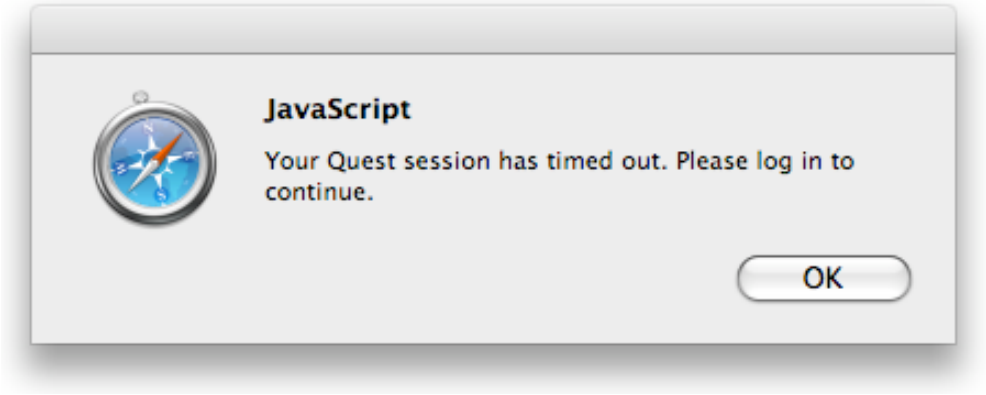
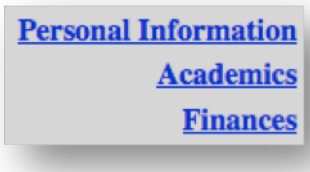


Figure 2.4 – Session Time Out

To log in again, refer to Section 2.1.

2.5 Navigation

Quest is divided into three areas: Personal Information, Academics and Finances. You can jump from one area to any other via the three links on the left side of the page. Within an area, you can use the "breadcrumbs" near the top of the page to navigate back to a higher level.



2.5.1 Selecting a Term

Selecting a term is vital to how you interact with Quest. With the exception of the Pre-enrollment and Unofficial Undergraduate Transcript pages, the content of each page is specific to the term in the sidebar. The default term selected is the current term. When viewing a course schedule, for example, the displayed schedule corresponds to the term selected in the sidebar.

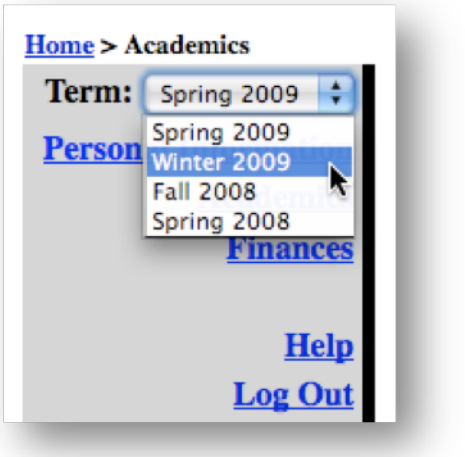


Figure 2.5 – Selecting a Term

By selecting a term in the past you are able to view financial information, personal schedule, and so on for each previous term.

For example, if you want to view your financial information for the term of Fall 2008, you can:

- Select Fall 2008 term from the Term drop-down list in the sidebar
- Navigate to the Finances area using the sidebar

- OR -

- Navigate to the Finances area using the sidebar
- Select Fall 2008 term from the Term drop-down list in the sidebar

Each method results in viewing your financial information for the Fall 2008 term.

The selected term is persistent for the entire Quest session. In other words, a particular term remains selected when navigating to different areas. The particular term remains selected until you log out or select a different term.

3 Modes of Operation

3.1 Finances

The Finances area allows you to pay your fees and view your account summary. This area contains useful external links including fee payment instructions and the Web site for OSAP (Ontario Student Assistance Program).

3.1.1 Outside of Quest

In the Finances area, the Outside of Quest section has links to the University pages for fee payment instructions, viewing earnings, financial aid and graduate student award regulations as well as the OSAP home page. Navigate to the Finances area by clicking Finances in the sidebar and resources located outside Quest are listed under the Outside of Quest heading as illustrated in Figure 3.1.

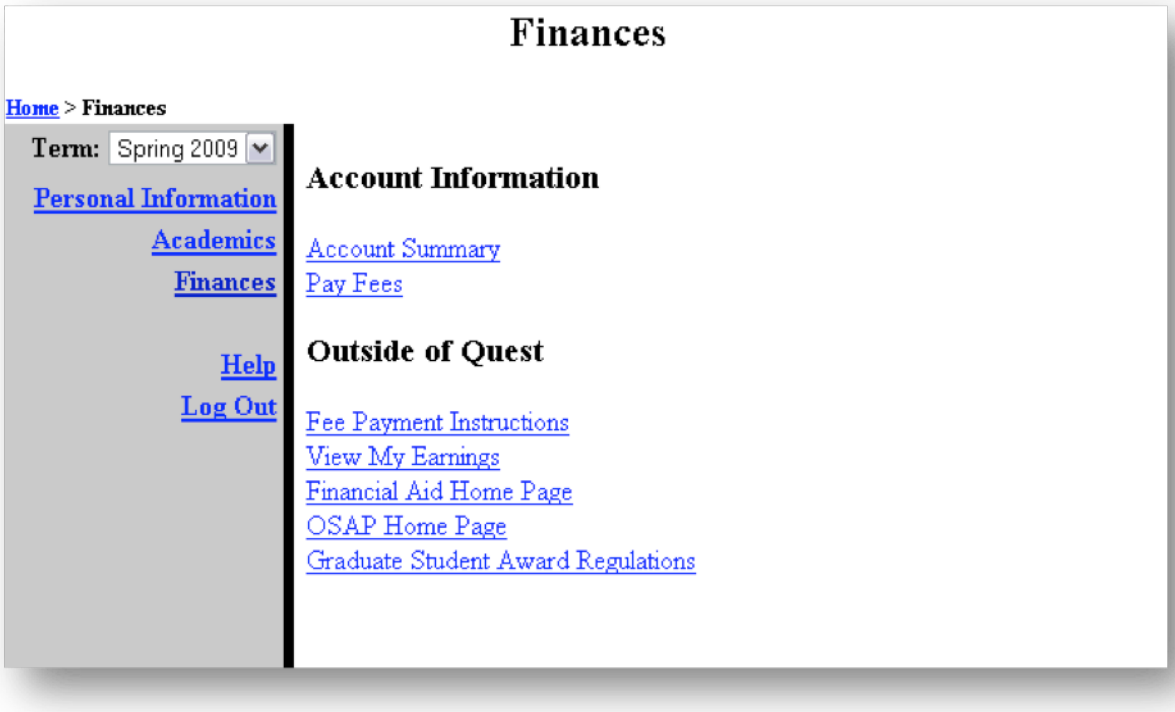


Figure 3.1 – Links Outside of Quest

3.1.2 View Account Summary

To navigate to the Account Summary area, from the Quest home page click *Finances* in the sidebar, followed by *Account Summary* in the main area as illustrated in Figure 3.2.

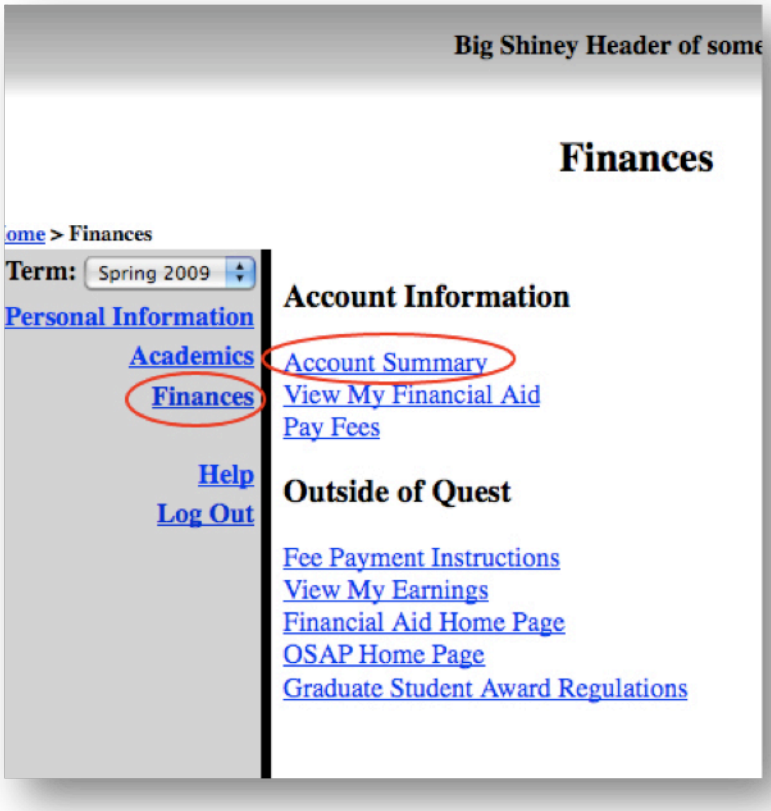


Figure 3.2 – Navigate to Account Summary

A summary table showing the total fees for the term, aid received and payments made is shown at the top of the Account Summary page. Below that is a table detailing all of the individual fees, including a description and amount for each fee. For optional fees, a checkbox is shown under the Opt Out? column. Checking the box for a fee opts you out of that fee and the page refreshes to show your new total in the summary as illustrated in Figure 3.3.

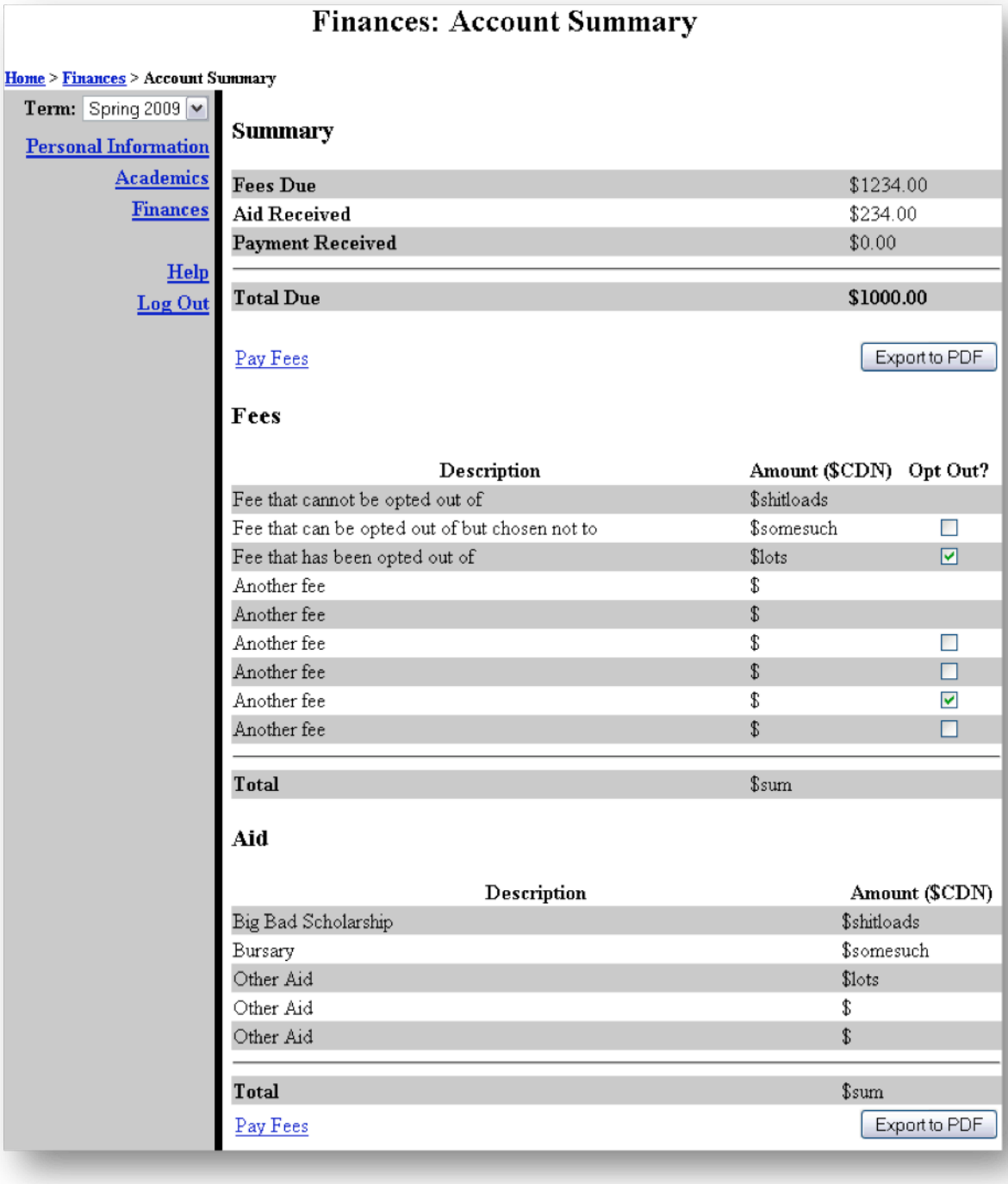


Figure 3.3 – Account Summary

A table detailing financial aid is at the bottom of the Account Summary page. The table includes a description and amount for each aid item. This table, as well as the summary table, is accompanied by a link to the Pay Fees page and an Export to PDF button. Refer to Section 3.1.3 below for more information on the Pay Fees page and Section 4.1 for more information on exporting to PDF.

3.1.3 Pay Fees

To navigate to the Pay Fees area, from the Quest home page, click on *Finances* in the sidebar, followed by *Account Summary* in the main area, followed by *Pay Fees* in the main area.

At the top of the Pay Fees page a summary table showing the total fees for the term, aid received and payments made is shown (Figure 3.4). Below that are links for making payments. The *Credit Card* link leads to a form where you can enter your credit card details and specify a payment amount. The *PayPal* link redirects you to a payment page at PayPal.com. Finally, the *Bank Payment* and *Cheque* links redirect you to the University's instructions for making such payments.

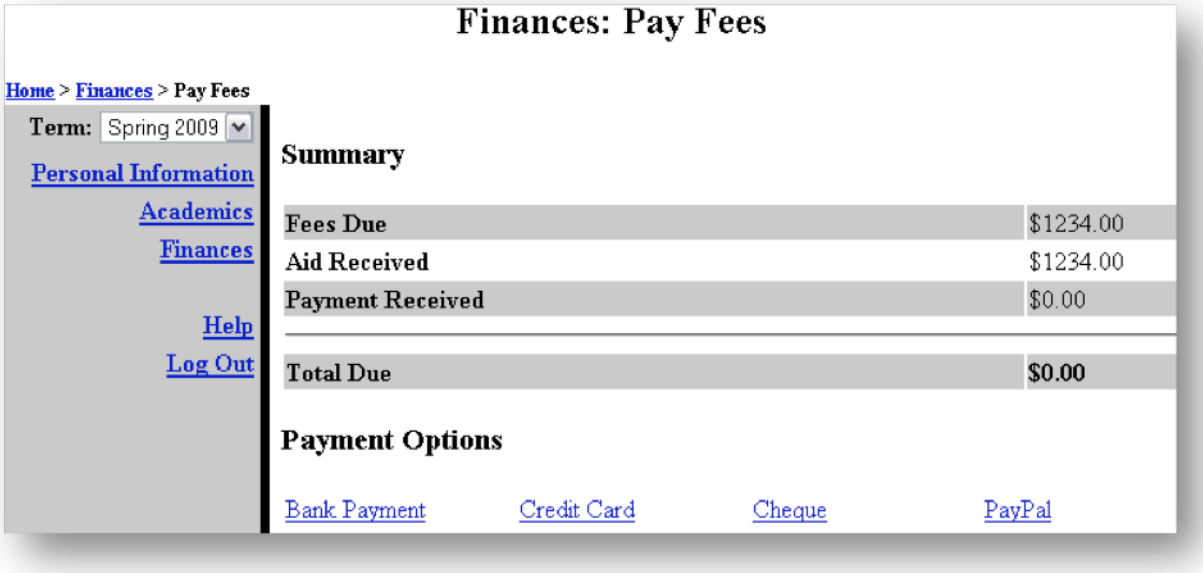


Figure 3.4 – Pay Fees

3.2 Personal Information

The Personal Information area is where all of your personal information is stored such as your name, mailing address and emergency contact information.

3.2.1 View Personal Information

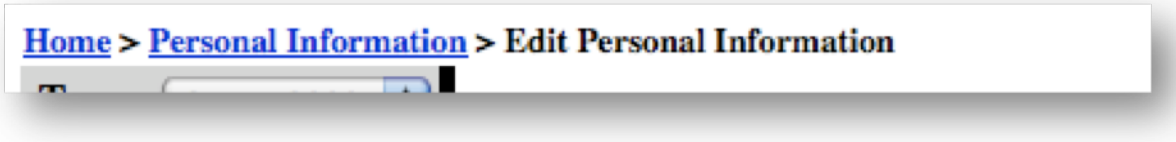
To navigate to the Personal Information area, from the Quest home page click on *Personal Information* in the sidebar.

The following information is displayed:

- Student Number
- First Name
- Last Name
- Email Address
- Phone Numbers
- Emergency Contact
- Service Holds

3.2.2 Edit Personal Information

To navigate to the Edit Personal Information area, from the Quest home page click *Personal Information* in the sidebar followed by *Edit Personal Information* in the main area.



On the Edit page you can change your personal information by updating the information in the text field adjacent to its respective label.

You can edit

- Email Address
- Phone Numbers
- Emergency Contact

Note: An item that appears grayed out and cannot be edited such as Student Number and Name.

When finished updating your personal information click the Save Changes button. If you do not click Save Changes your updated information are not saved. A particular field is not updated if its text field is left blank or if it is unaltered.

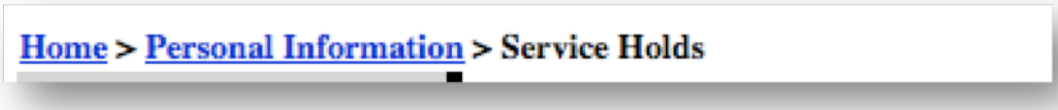
At any point on the Edit page you can revert all the fields to their old values by clicking the Reset button. If you click the Reset button all of your unsaved changes are lost.

3.3 *Service Holds*

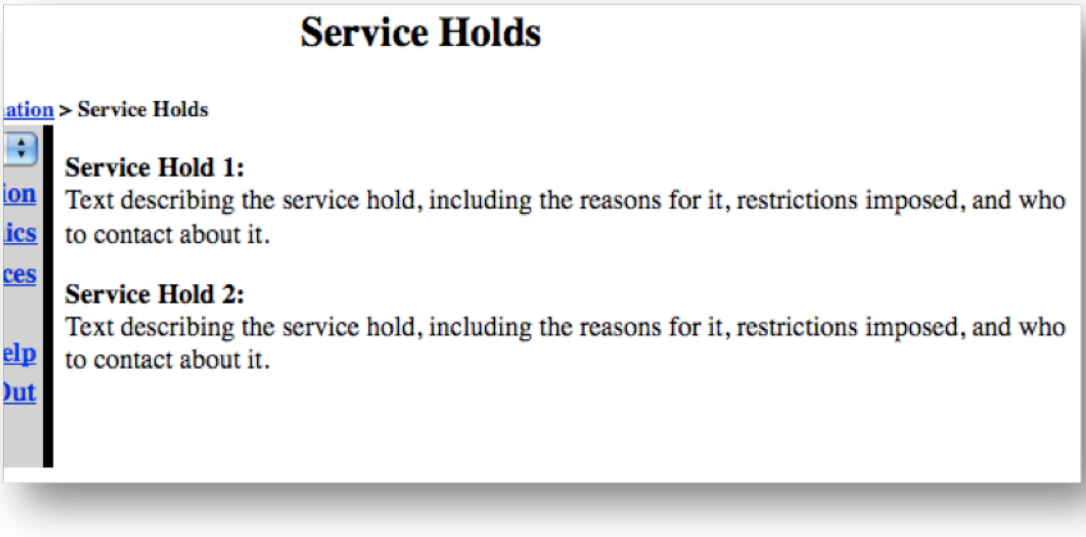
A service hold prevents you from accessing portions within the academic section of Quest. There are two types of service holds: Academic service holds and Financial service holds. A financial service hold is placed on your account if you have unpaid tuition or unpaid fines. An academic service hold is placed on your account if you have not met your program requirements or you have committed an academic offense.

3.3.1 View Service Holds

To navigate to the Service Holds area, from the Quest home page click on *Personal Information* followed by *Service Holds* in the main area.



If you have a service hold associated with your account it is listed in the main area as illustrated in Figure 3.4.


Service Holds
ation > Service Holds
ion
ics
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elp
)ut
Service Hold 1:
Text describing the service hold, including the reasons for it, restrictions imposed, and who to contact about it.
Service Hold 2:
Text describing the service hold, including the reasons for it, restrictions imposed, and who to contact about it.

Figure 3.4 - Viewing all Service Holds

If you have a service hold on your account you will receive a message when navigating to the academics area. It provides contact information that can help rectify the situation.

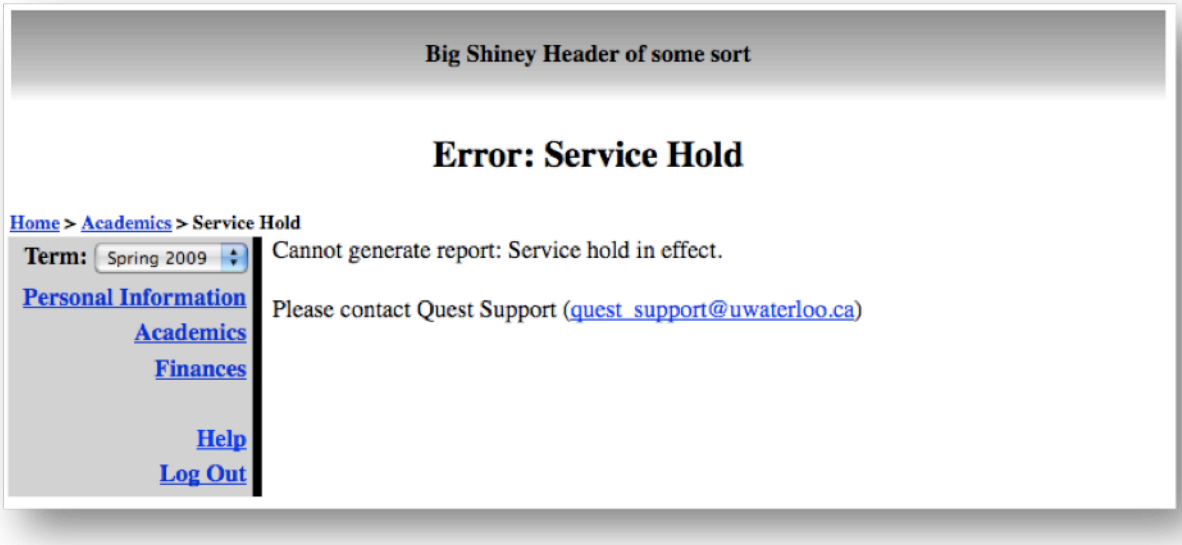
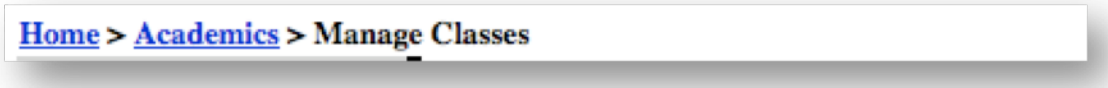


Figure 3.5 – Service Hold Error within Academics

3.4 Academics

3.4.1 Manage Classes

To navigate to the Manage Classes area, from the Quest home page click on *Academics* in the sidebar, followed by *Manage Classes* in the main area



The Manage Classes page displays a list of classes and Actions for Adding or Dropping classes (Figure 3.6). A class is composed of a Subject, Number, and Section can be modified by changing the values of the dropdown box. A class may appear grayed out if no action can be performed on it or the selected term is in the past.

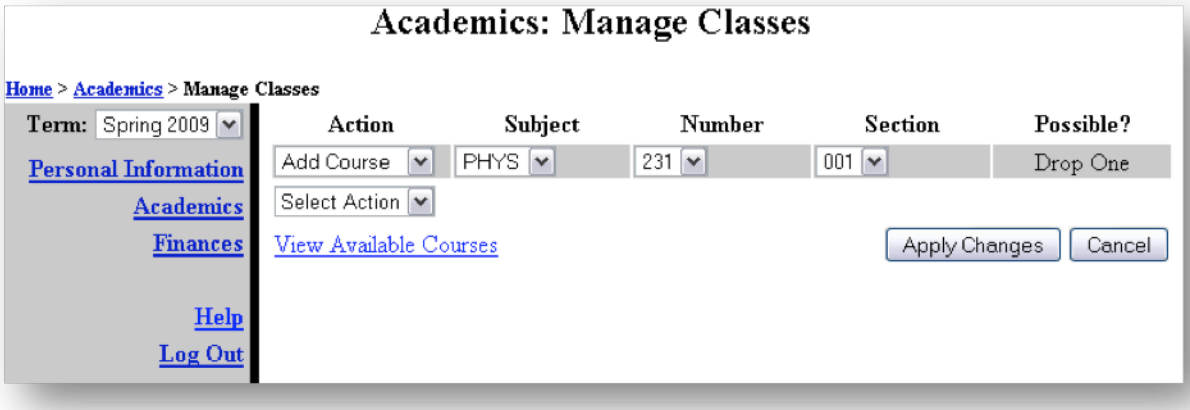


Figure 3.6 - Manage Classes

Courses you have been enrolled in show up automatically, with *No Action* selected in the Action column. The only other option for those courses is *Drop Course*, as shown in Figure 3.7.

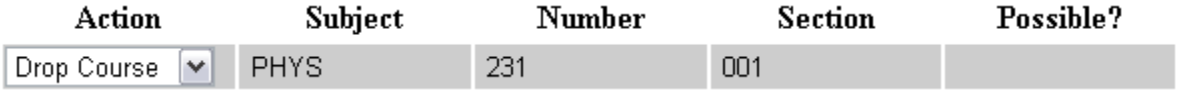


Figure 3.7 - Drop Course

An extra row is shown at the bottom of the page, by default empty except for the *Action*

column with *Select Action* selected, as shown in Figure 3.8. The only other option for the action is *Add Course* which, when selected, allows you to fill out the rest of the row for the course that you want, as shown in Figure 3.9.

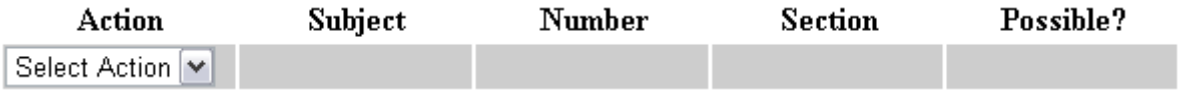


Figure 3.8 - Default Row

Figure 3.9 - Adding a Course

After you have selected actions and filled out the information, you can click the Apply Changes to carry out the actions or Cancel to reset the form. If errors occur when you try to apply changes, information is shown in the Possible? column. Drop One indicates that you have too many courses already and need to drop a course in order to take the new one. The No option indicates that you cannot take the course without completing a course override. Course overrides are not part of Quest; speak to your academic advisor if you wish to complete a course override.

3.4.2 View Unofficial Transcript

To navigate to the View Unofficial Transcript area, from the Quest home page, click on *Academics* in the sidebar, followed by *View Unofficial Transcript* in the main area under the Grades & Transcripts section as illustrated in Figure 3.10.

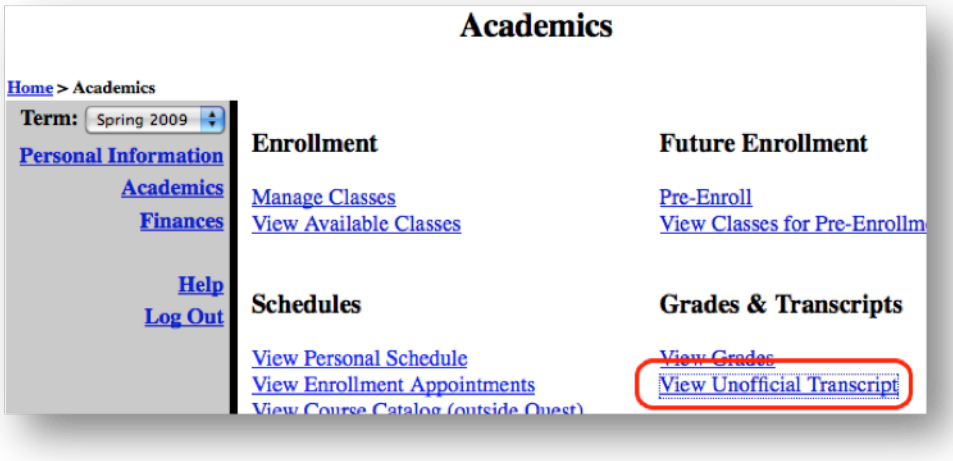


Figure 3.10 - View Unofficial Transcript

A processing screen appears while your unofficial undergraduate transcript is generated, with a progress bar indicating time until completion. Your transcript is displayed in chronological order, with each term listing the following components:

- Each class taken and its corresponding grade
- Grade Point Average
- Total credits earned
- Academic standing

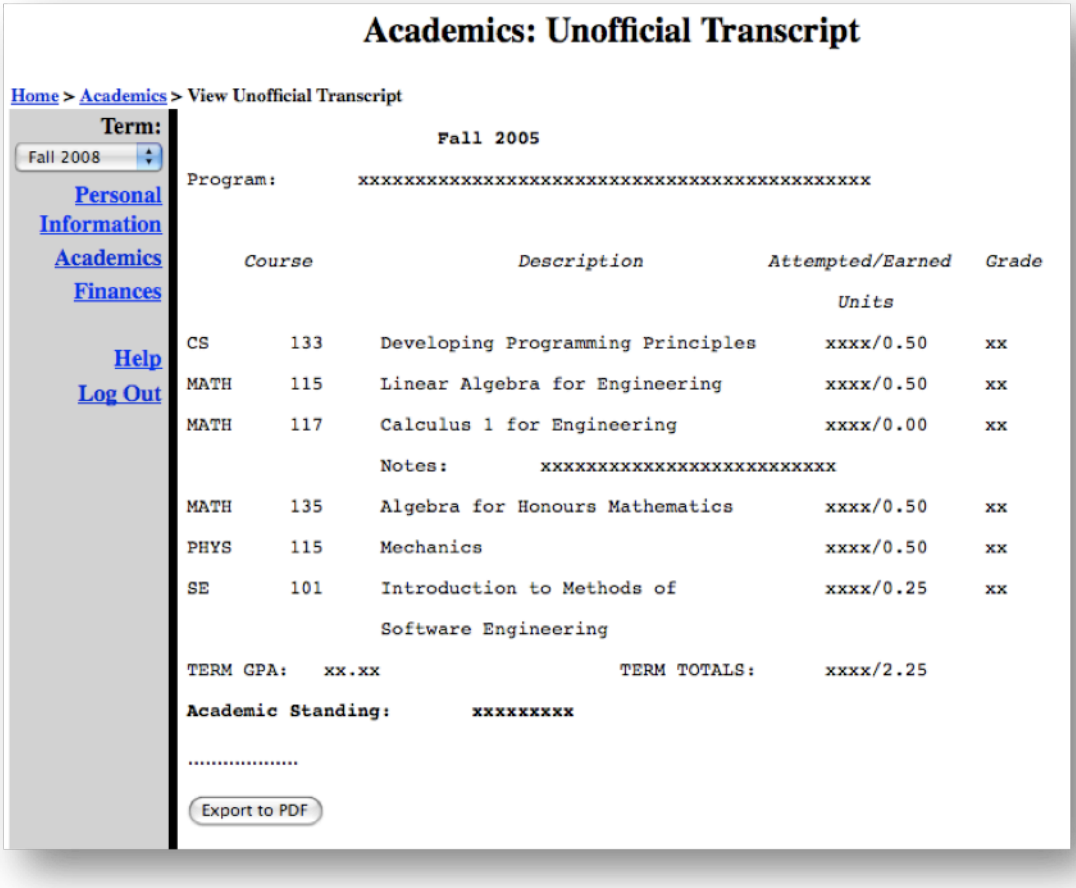
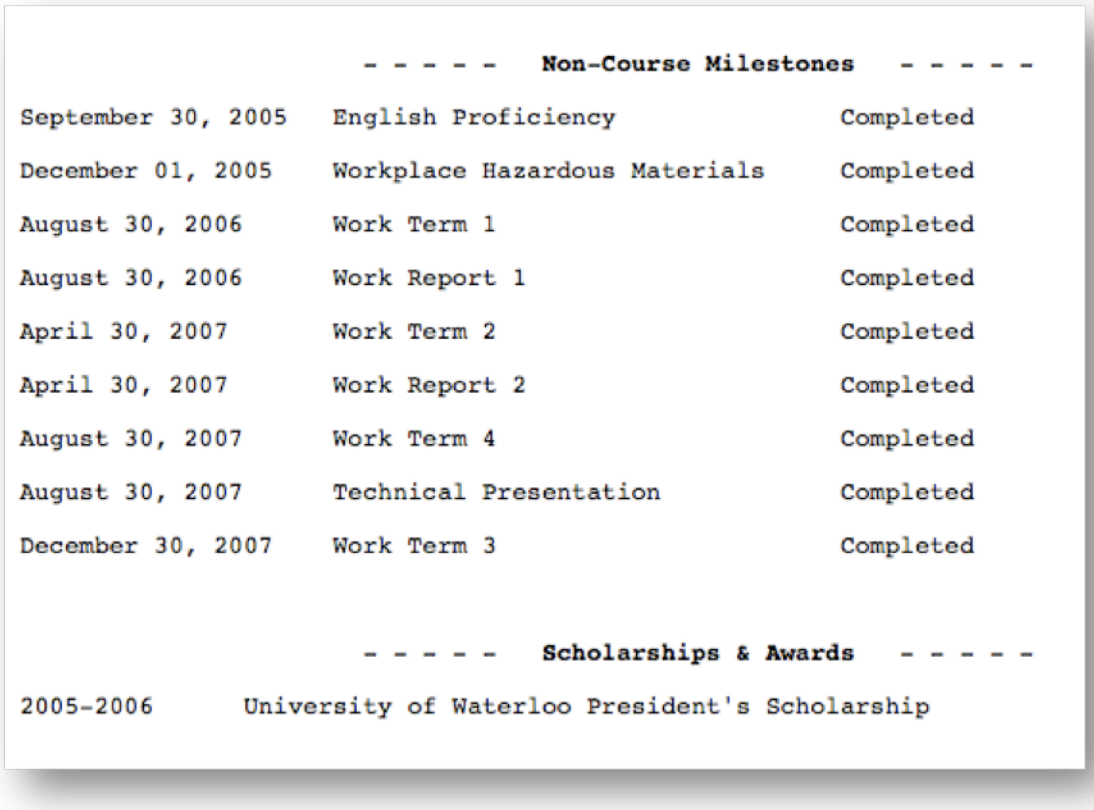

Academics: Unofficial Transcript
Home > Academics > View Unofficial Transcript
Term:
Fall 2008
Personal Information
Academics
Finances
Help
Log Out
Fall 2005
Program: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
Course Description Attempted/Earned Units Grade
CS 133 Developing Programming Principles xxxx/0.50 xx
MATH 115 Linear Algebra for Engineering xxxx/0.50 xx
MATH 117 Calculus 1 for Engineering xxxx/0.00 xx
Notes: xxxxxxxxxxxxxxxxxxxxxxxxx
MATH 135 Algebra for Honours Mathematics xxxx/0.50 xx
PHYS 115 Mechanics xxxx/0.50 xx
SE 101 Introduction to Methods of Software Engineering xxxx/0.25 xx
TERM GPA: xx.xx TERM TOTALS: xxxx/2.25
Academic Standing: xxxxxxxxx
Export to PDF

Figure 3.11 - Unofficial Undergraduate Transcript

If grades for a particular term are not official, there is no academic standing recorded for that term.

Following the information for each term is a list of career-long achievements, such as:

- Non-course milestones, such as the English Language Proficiency Requirement
- Awards and scholarships received



- - - - - Non-Course Milestones - - - - -

September 30, 2005	English Proficiency	Completed
December 01, 2005	Workplace Hazardous Materials	Completed
August 30, 2006	Work Term 1	Completed
August 30, 2006	Work Report 1	Completed
April 30, 2007	Work Term 2	Completed
April 30, 2007	Work Report 2	Completed
August 30, 2007	Work Term 4	Completed
August 30, 2007	Technical Presentation	Completed
December 30, 2007	Work Term 3	Completed

- - - - - Scholarships & Awards - - - - -

2005-2006 University of Waterloo President's Scholarship

Figure 3.12 - Non-course Milestones and Awards

For Engineering co-op students, each completed work term report is displayed as a non-course milestone and grouped under the term in which it was completed as an appropriately weighted course. Work term reports are not included in any grade point average calculations.

When attempting to view your unofficial transcript, you may encounter an error message stating “Cannot generate report: service hold in effect”. Refer to Section 3.3 for more information.

3.4.3 View Grades

To navigate to the View Grades area, from the Quest home page click *Academics*, followed by *View Grades* in the main area illustrated in Figure 3.13.

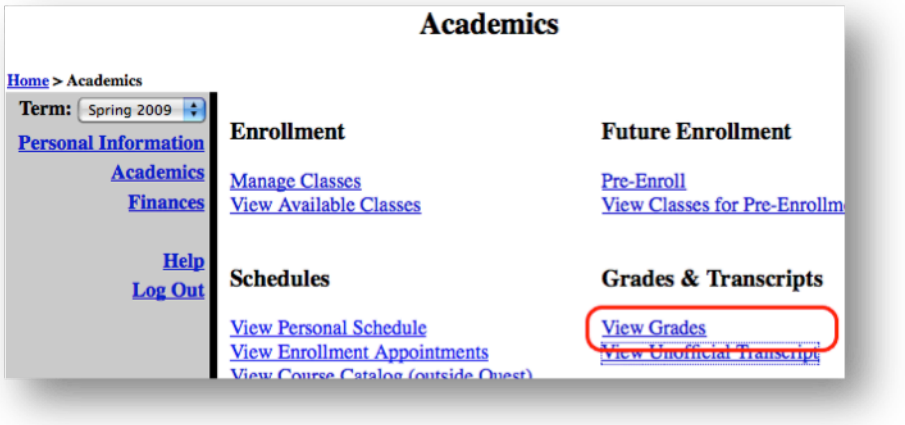


Figure 3.13 - View Grades

Your grades for courses that were taken in the term you selected after log in are displayed, listing the following components:

- Each class taken and its corresponding grade
- Grade Point average for the term
- Term statistics on grade point units
- Cumulative statistics on grade point units

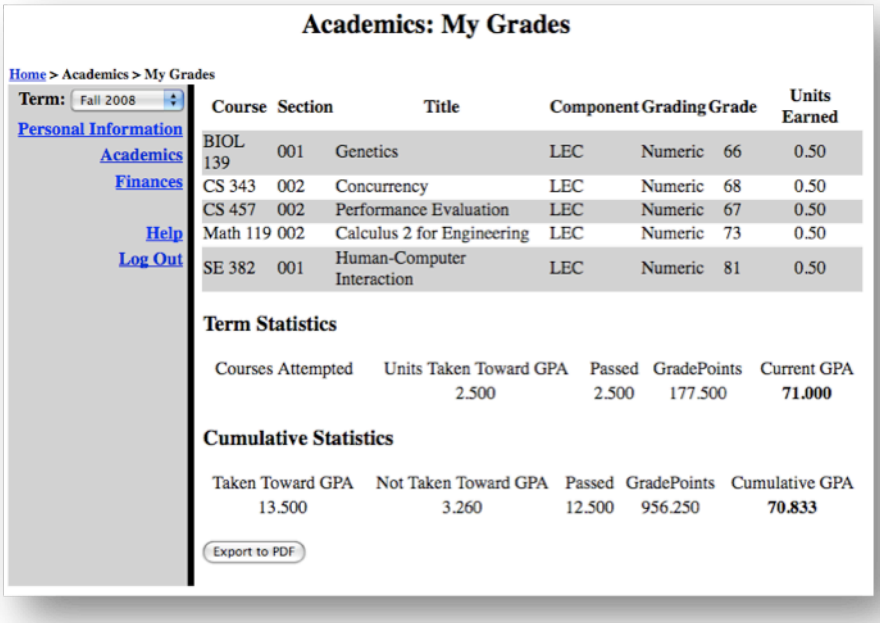

Academics: My Grades
Home > Academics > My Grades
Term: Fall 2008
Personal Information
Academics
Finances
Help
Log Out
Course Section Title Component Grading Grade Units Earned
BIOL 139 001 Genetics LEC Numeric 66 0.50
CS 343 002 Concurrency LEC Numeric 68 0.50
CS 457 002 Performance Evaluation LEC Numeric 67 0.50
Math 119 002 Calculus 2 for Engineering LEC Numeric 73 0.50
SE 382 001 Human-Computer Interaction LEC Numeric 81 0.50
Term Statistics
Courses Attempted Units Taken Toward GPA Passed GradePoints Current GPA
2.500 2.500 177.500 71.000
Cumulative Statistics
Taken Toward GPA Not Taken Toward GPA Passed GradePoints Cumulative GPA
13.500 3.260 12.500 956.250 70.833
Export to PDF

Figure 3.14 - My Grades

Alternatively, you can change the term for which grades are displayed by selecting a new term as explained in Section 2.5.

When attempting to view your grades, you may encounter an error message stating “Cannot generate report: service hold in effect”. Refer to Section 3.3 for more information.

3.4.4 View Available Courses

In the Academics area you can also view the courses that are offered in any given term. There are two different types of course lists that you can go to from the Academics page in Quest:

1. Click on the *View Available Classes* link under the Enrollment section to search the courses being offered in the current term, or previous terms that have passed;
2. Click on the *View Classes for Pre-enrollment* link under the Future Enrollment section to look at the list of courses that the various departments of the university plan to offer for the future term.

In View Available Courses, you may select any of the terms in the drop down list described in Section 2.5. On the View Available Courses page you can search using criteria such as subject, day of the week and time offered. An example search is shown in Figure 3.10. In this example, a search was done for classes at any time and any day of the week in the subject of Physics. The results of this search are displayed with a small description of each of the course contents under each of the corresponding course codes.

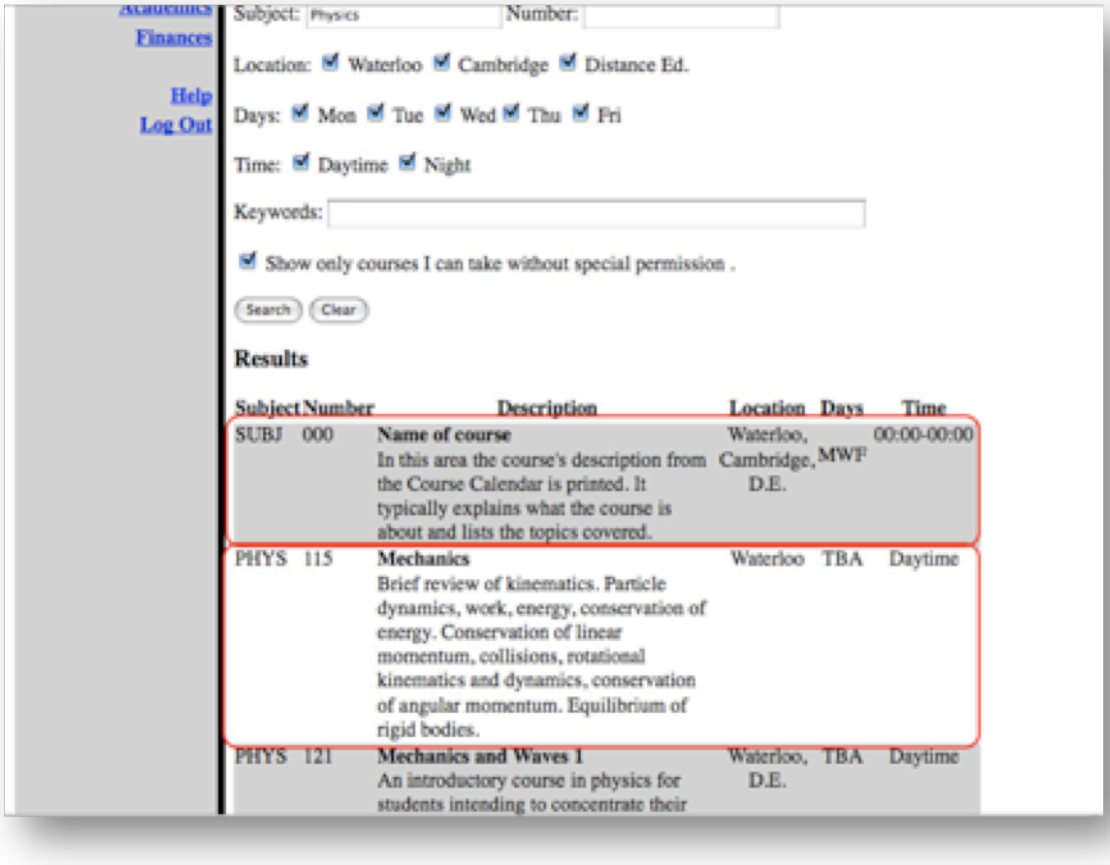

Finances
Help
Log Out
Subject: Physics
Number:
Location: Waterloo Cambridge Distance Ed.
Days: Mon Tue Wed Thu Fri
Time: Daytime Night
Keywords:
Show only courses I can take without special permission .
Search
Clear
Results
Subject Number Description Location Days Time
SUBJ 000 Name of course
In this area the course's description from the Course Calendar is printed. It typically explains what the course is about and lists the topics covered.
Waterloo, Cambridge, D.E.
MWF
00:00-00:00
PHYS 115 Mechanics
Brief review of kinematics. Particle dynamics, work, energy, conservation of energy. Conservation of linear momentum, collisions, rotational kinematics and dynamics, conservation of angular momentum. Equilibrium of rigid bodies.
Waterloo TBA Daytime
PHYS 121 Mechanics and Waves 1
An introductory course in physics for students intending to concentrate their
Waterloo, D.E.
TBA
Daytime

Figure 3.15 View Available Courses

In View Classes for Pre-enrollment, you are not able to change the term. Pre-enrollment is only applicable for the term after the next upcoming one. For example, if it is currently Fall 2008, the pre-enrollment courses that show up are for the Spring 2009 term. On the View Classes for Pre-enrollment page you can search using criteria such as subject, location offered. Notice that there are fewer options than there are in the View Available Courses page. Figure 3.16 shows an example for a search in Pre-enrollment. In this example, a search was performed for classes on any campus of the University of Waterloo or Distance Education (DE) in the subject of Physics. The results of this search are displayed with a small description of each of the course contents under each of the corresponding course codes.

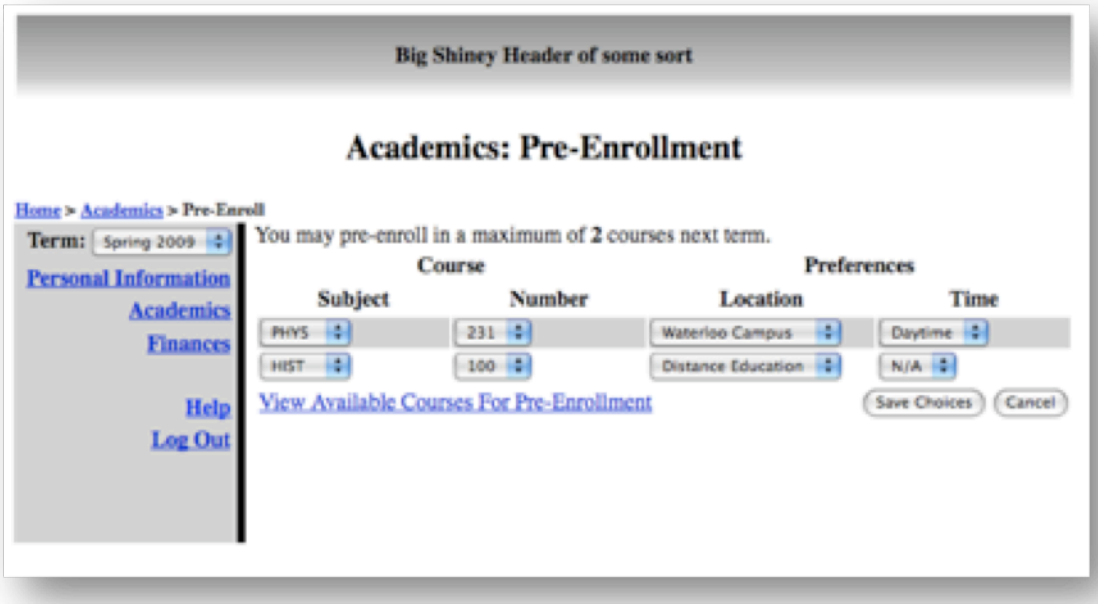


Figure 3.16 - Pre-enrollment

3.4.5 Browse Course Catalog

The Course Catalog is located outside of Quest. It is posted online at http://www. ucalendar. uwaterloo. ca/COURSE/index. html and is for you to search through and read about all of the courses that are offered at the University of Waterloo.

The Course Catalog does not, however, necessarily say when each of the courses is offered. Some departments put which terms they usually offer that course, but not all departments do this. For a more definite idea of if a specific course is offered in a given term, you can search for it in Quest using the instructions in Section 3.4.4.

4 Advanced features

Note: You require Adobe Acrobat® Reader to view PDF files.
Acrobat Reader free and is available for download at http://www. adobe. com/products/acrobat/readstep2. html

4.1 Export Document to PDF

Quest offers a feature to export several relevant documents to PDF (portable document format) for ease of printing and emailing including:

Account Summary	Home > Finances > Account Summary
Unofficial Transcript	Home > Academics > View Unofficial Transcript
Grades	Home > Academics > My Grades

To export a document from the Quest home page, first navigate to the document. Scroll down to the bottom of the document click the *Export to PDF* button. Your browser should handle the download accordingly.

4.2 Export Calendar to XML or iCal

You can export your personal schedule in XML or iCal formats. To export your personal schedule, first navigate to your Personal Schedule by clicking *Academics* in the side bar, followed by *Personal Schedule* in the main area. Click the Export to XML button or Export to iCal button to download your personal schedule in XML or iCal format respectively. Your browser should handle the download accordingly.